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ABSTRACT

Since the 1960s, the World Bank has been involved in educational policy around the world. Applying a "human capital theory/manpower forecasting" approach, the World Bank has focused on the infrastructure, that is, buildings and equipment, in vocational and higher education. At the same time, the power and influence of UNICEF and UNESCO, the main international agencies concerned with educational policy, have been declining. This paper summarizes several policy proposals advocated by UNESCO and the World Bank and examines them in a historical perspective to see if they have contributed to fostering indigenous knowledge and to safeguarding democracy, social justice, and the environment. The paper concludes that the rise in influence of the World Bank is posing serious problems within the educational field; affecting democracy, sovereignty, and self-determination of peoples; and contributing to the increase of the knowledge gap throughout the world. Among the policy papers examined here are the following: Learning to Be: The World of Education Today and Tomorrow (Faure, et al, 1972); the Education for All initiative (1990); Higher Education: Lesson of Experience (World Bank, 1994); and Priorities and Strategies for Education (World Bank, 1995). (Contains 34 references.) (WFA)

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Multilateral agencies and their policy proposals for education: Are they contributing to reduce the knowledge gap in the world?

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Abstract

The objective of this paper is to historically present some policy proposals advocated by UNESCO and World Bank, and briefly discuss if they are contributing to foster indigenous knowledge, to educate people able to analyze, criticize and propose rules for society, aiming the safeguard of democracy, social justice, and the environment. Indeed, it seems that World Bank policies proposals lead to an increasing dependence. Moreover, UNESCO, which in the past had a view more attuned with people's self-determination and sovereignty seems to have endured a great change, signing a joint document on higher education so distinct and distant from its previous framework.

First of all it is worthwhile to remember that UN agencies (UNICEF and UNESCO) were considered as the main international agencies concerning education policies. The World Bank began its work in this field in the 60s. Using a Human Capital Theory/Man Power Forecasting approach the World Bank focused on vocational and higher education, mainly on infrastructure; that is, building and equipment. However, since the 1990s the UN is suffering severe budget constraints and being compelled to make some reforms, which in the understanding of poor and developing countries will serve the interest of rich countries and groups. In this context, the power and influence of the UN institutions is declining while that of the banking institutions, mainly the World Bank, is increasing.

As we will show here, this situation is posing serious problems within the educational field, affecting democracy, sovereignty, self-determination of people, contributing to increase the knowledge gap in the world.

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1- 1972 FAURE REPORT AND THE 1974 NEW INTERNATIONAL ECONOMIC ORDER

The Faure Report complete title is *"Learning to be: the world of education today and tomorrow"* (Faure et al., 1972). It acknowledged education as a human right, indispensable to attend the aspiration of individuals, to promote universal understanding, to keep track over rapid changes in knowledge and in society, to reach democracy, and so on. Thus, education was to be accessible to all and at all times, as a lifelong process.

It acknowledged a growing gap between industrialized and developing countries:

> The ever-growing gap between industrialized and developing countries has produced the fundamental drama of the contemporary world[:]... [T]he objectively negative and harmful imbalance between the plenty enjoyed by some and the penury suffered by others. (Faure et al., 1972, p.49)

However, what was at stake was not only this widening gap:

> The great changes of our time are imperiling the unity and the future of the specie's and man's own identity as well. What is to be feared is not only the painful prospect of grievous inequalities, privations and suffering, but also that we may be heading for a veritable dichotomy within human race.... [T]he fundamental risk [is the risk] of dehumanization... For the harm done to man's nature would harm all men. (Faure et al, 1972, xxi, italics added).

Facing the advances in science and technology, being aware of the widening gap between rich and poor people and countries, as well as of the peril of dehumanization, a new educational order was proposed, giving a large role to science and technology, in what was referred as "scientific humanism.'

> [It is] essential [that] science and technology... become part of all educational activities... so as to help the individual to control not only natural and productive forces, but social forces too...; to help man to develop a scientific frame of mind in order to promote the sciences without becoming enslaved by them. (Faure et al., 1972, xxvi-xxvii, italics added)

The same document questioned international aid, considering inadequate its current forms, resources and even concept. In fact, the study pointed out that international aid, as it was being carried out, was in fact contributing to widen the gap between countries, imposing higher costs to developing countries and developing inadequate projects facing these countries needs and realities:

> Many visiting experts, for example, have difficulty in participating in local professional life. There may be mutual lack of understanding of cultural, anthropological and material conditions, or failure to adapt to the environment. Sometimes, attempts are made to transplant foreign models in mechanical fashion, or to apply directly, in developing situations, the experience of developed countries (Faure et al., 1972, p.242)

> The benefits it [international aid] should bring in theory are often greatly diminished in practice by excessive estimates of costs and prices, financing charges and supplementary expenses entailed (ibid., p.254).
> [W]herever the receipt of aid is subject to condition set by donor country [tied nature of some aid],....expenditure (mainly for the construction of school buildings) returns to companies in the donor nation. These firms make studies, transport equipment and send experts to building site, which often compels the recipient country to pay prices higher than accepted world rates... In short, tied aid.... may also narrow a recipient country's margin for manoeuvring. (op.cit., p.255)

Thus, the Commission called for more solidarity and cooperation and urged developed nations to increase global resources for international aid and give greater support to IDA, review high interest rates, abolish tied forms of aid, make more use of third world experts, support countries efforts to develop their own national strategies and priorities, foster the free interchange of knowledge and personnel, be aware of the perils of brain-drain, etc.

Indeed, the Commission considered that "only gifts or loans at 3 percent interest rates or less constitute aid" (Faure et al., 1972, p.248). This was significantly smaller than the acknowledged rate practiced by the World Bank in 1970; which was 7 percent (Faure et al., 1972, p.255).

The document also recognized the effects of external factors hampering countries' budgets and efforts in achieving the goal of education for all and as a life-long process:

> [W]e cannot overlook the fact that developing nations have been severely affected by the unstable world-wide market in raw materials and the collapse in exchange rates. Trade is evolving in a way unfavourable to them and they keep transferring an increasing volume of capital to industrialized countries to cover loan repayment and debt service charges. (Faure et al., 1972, p.257)

In addition, the Commission also made a call for reviewing world priorities and expenditures: "[P]rogressive general disarmament would not only be a vital safeguard for humanity, but would release vast resources for the development of human society (Faure et al., 1972, p.263).

Moreover, it was stated that the growing divide between countries would not be overcome without a spirit of cooperation, sharing and responsibility. This would include demanding redistributive measures not only financial constraints, but also of accumulated knowledge:

> [I]t is difficult to see how this division can ever be overcome – quite the contrary — without an organized, rational transfer, and equitable redistribution, of the scientific and technological stockpile which has accumulated at one pole of the community of mankind. (Faure et al., 1972, p.49)

1974 NEW INTERNATIONAL ECONOMIC ORDER: CONCERNS AND PURPOSES

G-77 meetings, since 1967, resulted in the approval, on May 1st, 1974, by the UN General Assembly of a New International Economic Order (NIEO), which was based on the principles of equity, sovereignty, equality, interdependence, common interest and common cooperation among all States.

The Declaration for this NIEO expressed concerns that:

> [T]he remaining vestiges of alien and colonial domination, foreign occupation, racial discrimination, *apartheid* and neo-colonialism in all its forms continue to be among the greatest obstacles to the full emancipation and progress of the developing countries and all people involved. The benefits of technological progress is not shared equitably by all members of the international community. The developing countries which constitute 70 per cent of the world's population account only for 30 per cent of the world's income….The political and economic well-being of present and future generations depends more than ever on co-operation between all the members of the international community on the basis of sovereign equality and the removal of the disequilibrium that exists between them. (United Nations, 1974)

The Declaration for this New International Economic Order established, among others, the following purposes:

> [T]he right of every country to adopt the economic and social system that it deems the most appropriate for its development and not to be subjected to discrimination of any kind as a result; full permanent sovereignty of every State over its natural resources and all economic activities. In order to safeguard these resources… including the right to nationalization or transfer of ownership to its national; the right of all States … to restitution and full compensation for the exploitation and depletion of, and damages to, natural resources and all other resources of those States, territories and peoples; the right of the developing countries and the peoples of territories under colonial and racial domination and foreign occupation to achieve their liberation and regain effective control over their natural resources and economic activities; just and equitable relationship between the prices of raw materials, primary commodity, manufactured goods by exported developing countries and [products] imported by them with the aim of bringing about sustained improvement in their unsatisfactory terms of trade and the expansion of the world economy; assistance to developing countries ….free of any political or military conditions; preferential and non-reciprocal treatment for developing countries wherever feasible…, whenever possible; favorable conditions for the transfer of financial resources to developing countries; access to the achievements of modern science and technology, and promoting the transfer of technology and the development of indigenous technology for the benefit of developing countries; need for all States to put an end to the waste of natural resources, including food products; the need for developing countries to concentrate all their resources for the cause of development. (United Nations, 1974)

2 - 1979 LAGOS PLAN OF ACTION; 1980 WORLD BANK PERSPECTIVE: "SYNDROME OF QUALIFICATION"; DOCUMENTS ON AFRICA (1980S).

It is worthwhile to mention that a strong claim -- brought about at the 1979 meeting of the African countries in Lagos, Nigeria, and consolidated into the Lagos Plan of Action (OAU, 1980/1985) -- was the need for the development of basic native science in order to reduce dependence by fostering autonomous and cooperative development. This would require policies to strengthen education in general, and higher education and research in particular. The Lagos Plan of Action declared the need for:

> Adoption [of] policies and measures that would ensure increasing reduction of dependence on the use of foreign experts and skills while promoting training of nationals in technical co-operation projects and fostering employment of African expertise within the region.. [This should be done in order to] improve indigenous skills and technologies [and to] … ensure the development of an adequate science and technology base and the appropriate application of science and technology in spear-heading development in agriculture; transport and communications; industry, including agro-allied industries; health and sanitation; energy, education and manpower development; housing, urban development and environment. (OAU, 1980/1985 p.41-45, italics added)

In this milieu, the 1980 policy document advocated the continuation of financing for higher education, but focusing on vocational and agricultural and, if possible, on new forms of institutions.

In accordance with the rising pressure toward the adoption of cost-benefit ideas, the same document states that the growing unemployment among graduates was not only a matter of "the wrong offer of courses" or "bad management," but mainly of excessive demand. This excessive demand was said as generated, among other factors, by the low costs of education for students and families. It is argued in the document that: "Because of the low private costs of education….[and the perspective of future higher private earnings] families try to educate the majority of their children….[This behavior engenders] 'a qualification syndrome,' [pressuring for more and more levels of education]" (World Bank, 1980, p.42-43, italics added).

To solve this "qualification syndrome problem," the document proposed some changes in the labor market, as well as in education, including private financing:

> [In order to] tempering the "inflation" of qualifications…[a] reduction in the disparities in wages between the modern and traditional sector… [is needed, as well as] requiring the beneficiaries to bear an increasing share of the cost of their education…[and] relating job specifications to the minimum required education, and, wages, to job specifications, rather than to credentials…. More jobs can be created … by a shift from a highly capital-intensive [scheme] to a more labor-intensive one, by improving rural infrastructure, or allocating a large proportion of the country's development budget for job-creating activities (World Bank, 1980, p. 43-44, italics added).

However, as wages in rural areas remained lower than in urban centers, and because credentials reduce the costs of the selection process and labor-intensive activities are considered more risky to entrepreneurs due to human needs, absences and demands, the most important solution seemed to be requesting the beneficiaries to bear an increasing share of the cost of their education. This would be achieved by: charging fees and reducing non-teaching costs, such as lodging, transportation, food and book supply.

Moreover, other measures to reduce costs, called "approaches for increasing efficiency," were:

> [I]mprovements in the use of staff by increasing the teaching load and the ratio of students to staff, and by eliminating unnecessary diversity or duplication of courses; using school space more efficiently; introducing accelerated courses of study, year round programs, and shorter and more intensive training periods; improving the student-selection process, and ….improve management through effective program budget, cost analyses, and procurement practices. (World Bank, 1980, p.72)

Translating these measures for higher education institutions would imply: reducing the number of teachers while increasing the number of students, reducing the offer of courses in terms of variety of themes and views, reducing individual space by allocating more students per square foot, creating short-term courses -- with reduced time to read and think and thus, to learn -- adopting standardized tests done by an outside company and accepting cost-benefit analyses as a decision-making tool.

The 1980 education policy paper advocated the creation of non-university models of higher education as another way to diminish pressure on the creation or expansion of university courses, and thus, a manner of reducing costs (World Bank, 1980, p.46).

3 – 1982, THE NEW ROLE ASCRIBED TO THE WORLD BANK

In 1982 there was a meeting held at The Brookings Institution (Fried and Owen, (Eds). 1982), in which took part high-level staff of the of American Government, World Bank, Trilateral Commission, such as David Rockfeller; Robert McNamara; McNamar, George Schultz. During this meeting it was defined the a new role for the World Bank: to act as debt manager of third World countries, rather than a development bank, Thus there was more emphasis on Structural Adjustment Loans, rather than "development projects".

The new perspective came from the U.S. Deputy Secretary of Treasury, R.T. McNamar, as well as George Schultz who wanted to connect World Bank policies to Reagan's restructuring and

monetarist market perspective. McNamar, begins stating that the Reagan government regard the World Bank as an "integral component" of its economics administration approach to international economics. He continues stating that:

> [I]ncreased aid increases industrial countries' budget deficits at a time when their deficits already are considered to be too large. Similarly, measures to increase liquidity, such as SDR [Special Drawing Rights] allocations, increase liquidity at a time when liquidity is already excessive... At present we eagerly wait the specifics of promised Bank initiative regarding the repackaging of IDA financing. The new proposal must be economically sound. We cannot expect larger and larger replenishments for concessional financing.... The Reagan administration will not make popular, convenient commitments... the key issues are...: the length of maturities, including possible acceleration of repayment schedules; fees and rates charged [increase and adopt some to IDA]; and the conditionality [open markets, privatize, reduce "wasteful domestic programs"] and the relationship to blend lending [that is to mix IBRD and IDA loans and progressively move toward IBRD hard lending]. [Indeed], development banks should more actively promote the co-financing package. (McNamar, 1982, p.40-43, italics added)

He also stated that aid resources should be distributed on a competitive basis, a process in which those countries willing to comply with the economic rules would get the money. In his words: "Scarce aid resources should be focused increasingly on the most deserving. The winners of the competition for limited funds....[must be chosen among] those which promise [to] deliver the best economic performance" (McNamar 1982, p.45-46).

Shultz agreed with the Treasury deputy in the sense that more loans could postpone adjustments and increae countries' debt. What was needed was a sharp change in the character of these loans and concessional aid to a more market-driven perspective. In his words:

> Concessional aid can play a critical role in economic development... Associate it with the constructive instincts and abilities of others. Parlay it into a place at the table wherever the rules for trade and investment are worked out. ... this is the time for a fresh offensive on behalf of hard but constructive actions. (Shultz,1982, p.20)

About the debt question, McNamara, who heavily promoted the activity of private banks recycling petrodollars toward developing countries, recognized that private flow would be sharply reduced because all recycling lending has increased the exposure of commercial banks in developing countries. Moreover, he also acknowledges that "by the end of 1980, total, developing country debt had reached $440 billion (compared to about $68 billion in 1970), of which two thirds was held by private lenders, compared to one-third in 1970" (McNamara, 1982, p.8).

Consequently, he concluded that:

> Throughout much of the decade, if not all, official flows from government and multilateral institutions must supplement private flows to a far greater extent than during the 1970s...

> The international financial institutions particularly the International Monetary Fund and the World Bank, but regional banks as well, carry a heavy responsibility in this situation…. The multilateral institutions… would provide the type of finance, technical assistance, and macroeconomic policy advice not available from other sources. (McNamara 1982, p.9)

From then on squeezing budgets, freeing money to pay debts; thus education and other social areas were to suffer cuts; be more "economic efficient"; but not pedagogically….

4- 1990 EDUCATION FOR ALL INITIATIVE: UNESCO AND WORLD BANK DIFFERENT PERSPECTIVE

As was mentioned earlier, UNICEF was the main agency concerned with the education of children, while UNESCO was the leading agency in terms of coordination of global policies. However, from Jomtien on, although UNESCO was officially the lead agency, the World Bank effectively took control of the process, putting the UN institutions and their goals in a subordinate position

Although the Inter-Agency Commission of the Conference was comprised of UNDP, UNESCO, UNICEF and The World Bank, the Executive Secretary of this Commission was Wadi Haddad, the coordinator of the 1980 World Bank education policy paper and a long 'ime advocate of cost-benefit analyses.

The affiliation of the World Bank with the Education For All (EFA) initiative could be seen as an advancement of the World Bank's position. The joint EFA document was based on the idea of education as a human right; that is for all, and concerned with people's empowerment, dignity in life and countries' diversity, as can be seen in the following excerpt from the World Declaration on Education for All:

> Every person—child, youth and adult – shall be able to benefit from educational opportunities designed to meet their basic learning needs. These needs comprise both essential learning tools (such as literacy, oral expression, numeracy, and problem solving) and the basic learning content (such as knowledge, skills, values and attitudes) required by human beings to be able to survive, to develop their full capacities, to live and work with dignity, to participate fully in development, to improve the quality of their lives, to make informed decisions, and to continue learning. The scope of basic learning needs and how they should be met varies with individual countries and cultures, and inevitably, changes with the passage of time. (WCFEA, 1990, p. 43, italics added)

However, in the same document, Barber Conable, at that time President of the World Bank, reinstated the old economic bias, showing the real concern of the Bank in this collective endeavor:

> Ministers of Finance, as well as those working in development Banks, should be pleased to note that education produces substantial value for money. This is reflected both in national accounts and in individual earnings. As people are educated, earnings grow, so do savings,

so does investments, and in turn, so does the well-being of society overall. (WCFEA, 1990, p.11)

The fundamental (essential, leading, comprehensive, life-long) quality of education for all, as defended by the UN institutions and progressive social movements, turned out to be a facade for the advocacy of basic education (fast and cheaper instruction, mainly to women and girls) replicating the ideas of the 1980 World Bank education policy document. That is, teacher education was reduced to in-service or at distance training; stability and career promotion were changed to job-market flexibility; teachers could be substituted by TVs, radios or books; the number of students per class was to increase; the school should function in three terms, and trade-off should be made between serving rural areas or low density areas and urban areas.

Here it is worthwhile to point out that UN decisions are made in its General Assembly, in which each member country has a vote. Since the UN was created, the Presidency of the institution has been occupied by officials from distinct countries. Conversely, at the banking institutions, most of the decisions are made by the Board of Directors, and the seats are proportional to the country's financial contribution; that is more money, more power. At the World Bank, for instance, the decision-power to define polices and priorities as of 1990 was concentrated in five major countries: USA - 17.7 %; Japan- 8.0%; Germany-6.2%; France-5.9% and United Kingdom-5.9%. Moreover, since the Bank was created, the Presidency has been occupied by an American (World Bank, n.d., p.31-32).

Because of this difference and being more permeable to the demands of a broader number of countries, the UN was the seat of the Declaration of Human and Social Rights, of the 1974 proposal for a New International Economic Global Order, as well as of specific agencies created to deal with larger development issues, such as economic development and industrialization (UNDP), trade relations (UNCTAD), agriculture and food supply (FAO).

5- LEVERAGE OF THE WORLD BANK AND UN FINANCIAL CRISIS 1990S - ONLY BASIC EDUCATION

With the fall of the Berlin Wall in 1998, the market-driven drift became stronger than ever, and (neo)liberal economic thought was proclaimed as the best, unique, and even the last and most perfect theory and model to solve and analyze all problems in the world (Fukuyma, 1994). All dissent toward this market-driven perspective of regulating society and the demands for a more social approach were vehemently denied and deemed invalid. Indeed, in a 1994 new introduction of

Hayek's 1944 book, *The Road to Serfdom*, Milton Friedman stated that: "the defenders of a Marxian-type collectivism [have been reduced] to a small band concentrated in Western universities. Today, there is wide agreement that socialism is a failure, capitalism a success" (Hayek, 1944/1994, p. xv).

According to this kind of (neo)liberal hegemonic trend towards a commercial, private-market and legal perspective, all relations, programs, personal and social transactions and interactions were to be seen from a business perspective; that is, everything should be economically efficient. All decisions about the initiation or continuity of programs, relations or transactions were to be made by using cost- benefit or cost effectiveness analyses as the preponderant or unique perspective. The evaluation was no longer of processes but of products, using standardized performance indicators.

With all these changes, governments, mainly those from poor and developing countries, are losing their autonomy and turning into hostages of multinational corporations and rich groups. These groups continue to press for "structural adjustments" and market openness that has as their final aim to improve capital benefits both directly (exemptions, regressive taxation, etc.) and indirectly (roads, research, labs, etc.).

Cuts in government budgets urged by the (neo)liberal perspective are making the assault on social institutions by corporations easier. Corporations are forcing them to work under corporate profit-seeking objectives, putting aside ethical principles and human and social rights.

Indeed, the situation now is worse than at the time of government influence because the possibilities for demanding social and human rights are waning, as all prior rights are being transformed into commodities, and thus, regulated by commercial relations. Consequently, "rights" are only linked with those of private property; and therefore, any social thoughts go against the economic, individual, and extremely private perspective of the dominant ideology ((neo)liberal) in the world.

Economic restructuring in areas such as education and health, based on the ratio of student to professor, patient to physician, and nurse to patient, leads to cuts in personnel, quality and length of care. This business approach ignores different diseases and individual reactions, as well as cultural, social and economic differences, requiring specific attention and care. Life, itself, is in jeopardy. In terms of health care, patient conditions and needs, as well as physicians' evaluations, are superseded by the quest for profits of private health care business. In terms of education, all processes are reduced to a final product, which supposedly can be evaluated by standard tests. This

means that education is not seen as a continuous process, in which multiple conditions and actors play a part. Factors such as school goals, school organization and pattern of interaction, regional/local milieu, class size, curriculum, level of teacher's education, remuneration, work conditions and social, cultural, psychological, and economic background, including parents' level of education and aspiration, family conditions of life, remuneration and opportunities, all contribute to diversity in educational experience. But all this diversity and its complex relation is omitted and reduced to a trend towards homogenous tests, planning, evaluation, training and financing.

As has been shown, this perspective has come to dominate all aspects of people's lives at the institutional, governmental and personal level. With reference to the institutional level, it is important to note that inside The World Bank Group, all institutions that work more directly on behalf of the private sector (the International Financial Corporation, the International Center for Settlement on Investment Dispute and the Multilateral Investment Agency) have greatly expanded, while the IDA which lends money to the poorest countries of the world, with low interest rates and for long terms, has seen its resources squeezed (Wolfensohn, 1995).

Besides these worldwide institutions, the regional development banks, such as the Inter American Development Bank, that also follow the World Bank guidelines and development concepts, have channeled their resources to support poor and developing countries' projects that were based on market-driven reforms: that is privatization, adoption of the business management approach by government and its institutions, mainly in education, research, pensions, health, transportation, and so on.

Moreover, as showed in the United Nations' 1999 Human Development Report (UNDP, 1999), there was also a concentration of resources toward particular areas: "Of the foreign direct investment in developing countries and the countries of Central and Eastern Europe in the 1990s [31% of the world total investment], more than 80 per cent went to just 20 countries, mainly to China." Meanwhile, other multilateral institutions with a more humanitarian and political perspective, such as the United Nations, are facing a similar situation to that of the IDA concerning resource constraints.

Both are financially dependent on contributions from their member countries. However, the biggest contributor, the U.S., is also the biggest debtor. According to the United Nations (1999, June):

> As of 31 May 1999, Member States owe the United Nations... over $2.6 billion for current and past assessments.... The largest debtor, the United States, owes the UN $1.6 billion for past and current assessments, two-thirds of the total due.

Leadership and lobbies in the U.S. Congress, while postponing and avoiding an approval to provide the payment, were pushing to vote to reduce the American contribution, to attach conditions to aid monies, as well as to reform the United Nations.

The same UN on-line document on financial issues stated that "The United States paid just enough by the end of 1998 to avoid automatically [losing] its right to vote in the General Assembly." (United Nations, 1999, June). Indeed, the maintenance of its right to vote is very important to the U.S., not only because it is a way to push for a desirable path of reform, but also to exert influence on UN decisions, while keeping the institution in a serious financial situation.

As stated in the same UN financial document:

> The two-year budget the UN adopted for 1998-99 is a tough, zero-growth plan that starts off with $100 million less in appropriations than for 1994-95. Nearly 1,000 posts have been cut, reducing the number of staff to about 8,700, from 12,000 in the mid-1980s. (United Nations, 1999, June)

The trend to reform is already happening, such as the cut in personnel, at a moment in which the world economic chaotic situation is more demanding because of this market-driven approach.

The U.S. and corporations' pressure over the UN seems also to be succeeding in changing key leaderships. The veto to the re-election of Boutros Boutros-Gali, as the General Secretary, and the election of Kofi Annan were the first change recently achieved. The placement in 1999 of an ex-World Bank senior official, Malloch Brown, as the Chief of the UN Development Programme (UNDP), and the substitution of the European leadership at the UN Educational, Scientific and Cultural Organization (UNESCO) by a Japanese, must also be seen in this path of changing the UN toward a more market-friendly orientation.

Michael Hirsch (1999), in an article published in Foreign Affairs -- the Council of Foreign Affairs' main publication -- reveals U.S. concerns with the UN, as well as delineates its desired role. He also criticizes the Clinton administration's attitude toward the UN -- delaying payments, weakening and dismissing the institution -- warning that this behavior could make the UN:

> [B]ecome the Third World talking shop...; The Security Council [without a strong leadership] would degenerate into a mere soapbox used by once and would-be great powers (Russia, China, France) to puff themselves up; and the United States would stand estranged from the organization. (Hirsch, 1999, p.3)

Indeed, he points out that some "teetering" attitudes are already occurring, and the U.S. is perceiving the importance of exerting its influence:

> [L]ast year... Moscow, Paris, and Beijing virtually allied with Saddam Hussein to cast [out] UN weapons inspectors from Iraq... Increasingly, Washington looks on the Security Council as a place where it must go, holding its nose, to wrest an okay for collective action. (Hirsch, 1999, p.3-5)

He then states that the UN, more than ever, is important to the U.S., considering the growing emergence of conflicts around the world, and the UN's possible role as a worldwide law enforcement institution. In his words: "The United Nations... is now more central than ever to America's global interests...it is the closest thing to a globalcop.... The Security Council may be becoming, through its accumulated resolutions, the chief source of international case law." (Hirsch, 1999, p. 3, 5, 6)

Hirsch (1999, p.7) concludes, stating the need to reform the UN, including the elimination of some of its agencies: "There is no question that the United Nations need reform... outdated agencies like the UN Conference on Trade and Development could easily be absorbed into superseding organizations like the World Trade Organization."

Poor and developing countries are criticizing these trends toward UN reform, stating that

> The "UN reform" process... has been largely driven by the pursuit on the part of a few developed countries... In pressing for reforms, their underlying aim had been to downsize the UN and modify its mandate and priorities to conform with their own preferred view of the UN's roles and future course. (South Centre, 1999)

They also advocate for a strong UN, but as a democratic institution, and not as a law enforcement body. They demand the need to reinstall and assert original UN principles of cooperation, democracy, participation, sovereignty, equality, equity, self-determination of all peoples, and so on.

6 - 1994 HIGHER EDUCATION: LESSONS OF EXPERIENCE; 1995 PRIORITIES AND STRATEGIES.

"*Higher Education: Lessons of Experience*" (World Bank, 1994) and *Priorities and Strategies for Education*" (World Bank, 1995a), advocate more "managerial, administrative and financial reforms," along with the growing claims for State reforms.

The main objective of the *"Lessons of Experience"* was to amplify higher education reforms, following the market-driven perspective and, at that point, giving more emphasis to State and institutional reforms. Thus, the 1994 "higher education policy paper" not only emphasized the cost-cutting perspective, but also fostered the idea of privatization, including a clear support for the

existence of a strong linkage of the university's knowledge-production capacity with the private sector's profit-seeking objectives.

Rather than thinking on how to alleviate the enforced adjustment and its detrimental effects on low and middle-income countries' development and quality of life, once more, financial constraints were stated as an unquestionable fact:

> Despite the clear importance of investment in higher education...the sector is in crisis throughout the world. In all countries higher education is heavily dependent on government funding.... (World Bank, 1994, p.1-2)
>
> In a era of widespread fiscal constraints,... quality improvements and enrollment expansion in higher education will have to be achieved with little or no increase in public expenditure. (World Bank, 1994, p.3, italics added)

In the aforementioned policy paper, the World Bank set up four main directives for higher education reform: 1) the encouragement of greater differentiation of higher education institutions, including the development of private institutions; 2) the promotion of diversification of funding sources for public higher education; 3) the redefinition of the role of the state, with greater emphasis on institutional autonomy and accountability and, 4) the advancement of policies which give priority to quality, responsiveness and equity objectives (World Bank, 1994, p.4).

Several studies on higher education reforms were carried out all over the world (Brazil, Argentina, China, Jordan, Vietnam, Russia, etc), having Chile as the main model.

The 1995 Priorities and Strategies fostered the economic perspective based on costs and result-driven analyses. Aiming to "optimize" the administration and use of the few existing resources the document advocated and implied the implementation of measures, such as adding more students per class, substituting teacher training for teacher education, substituting text-books for teacher, shrinking the physical dimensions of class or labs, and reducing or eliminating out-of school costs, such as uniforms, transportation, housing, and meals. And certainly it was necessary to direct the government's support for basic education as much as possible. Moreover, as in many developing countries, teachers were civil servants, counting on some job stability and fixed monthly income. This situation should also be changed in order to reduce teacher costs. Another way was to introduce pay for productivity; that is, use some criteria by number of students attended and number of classes taught (and even more recently, students performance in standardized tests).

7 - UNESCO DOCUMENTS ON HIGHER EDUCATION (1995-1996); PRINCIPLES NOT SO STRONG AT THE DELORS REPORT (1996) / WORLD CONFERENCE ON HIGHER EDUCATION (1998) AND THE WORLD BANK DISTINCT PERSPECTIVE

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In the 1995 policy paper UNESCO showed concerns with the process of dismantling higher education, mainly the research institutions, and the consequences to countries and people's living conditions within a rapidly changing world:

> UNESCO is concerned that the deterioration of general conditions for education and research and thus the decline of higher education institutions in some countries is widening the gap between industrialized and developing countries with regard to their capacity to absorb and develop modern technology and new knowledge. The persistence of such imbalances impairs their capacity to cope with present and future global challenges. (UNESCO, 1995, p.40)

The goal of higher education as stated in the 1995 UNESCO policy paper should be that of acting as "an instrument for reaching sustainable human development" (UNESCO, 1995, p.4). "Sustainable human development" was defined as the placement of economic development serving social development and ensuring environmental sustainability, based on democracy, tolerance and mutual respect (UNESCO, 1995, p.7 and 13, italics added).

Recognizing the existence of financial constraints, the document not only called for the search of new sources of funding, but also to improve management.

> Notwithstanding, the document expressed skepticism on the possible importance of alternative funding, facing the severe economic and social circumstances endured by many poor and developing countries: "[I]t would be erroneous to expect that alternative funding can bring higher education out of the current crisis and stop the process of deterioration now affecting many institutions, particularly in the developing countries" (UNESCO, 1995, p.8).

Moreover, the same document warned about the perils in confusing better managements and the search for new sources of funding with reducing public support to higher education:

It is important not to confuse the liberalization of economic relations and the need to promote an 'entrepreneurial spirit' with the absence of public social policies, in particular in relation to financing of higher education. Nor should the granting of institutional autonomy be interpreted as a policy alternative to force institutions to raise their own funds. (UNESCO, 1995, p.27)

> In summary, the UNESCO policy paper reinforced the importance of higher education for society in general as a way of fostering economic competitiveness, cultural development and social cohesion. Moreover, it urged, in bold type, public financial support: "[P]ublic support to higher education remains essential to ensure its educational, social and institutional mission" (UNESCO, 1995, p.28).

The call for support of higher education was also placed on the international community, including multilateral institutions, government institutions, and NGOs, as well as higher education and research institutions and personnel: "[I]t is crucial that the international community... should see support for higher education institutions as essential for the overall development of the education system as well as for the enhancement of endogenous capacity-building" (UNESCO, 1995, p. 34, italics added).

Indeed, the support of international cooperation was strongly emphasized in order to overturn the decline of higher education institutions in developing countries, mainly in the poorest ones. However, this international cooperation should not be an imposition of imported models, but should reduce dependence on them. Therefore, international cooperation "should be based on genuine partnership, mutual trust, and solidarity" (UNESCO, 1995, p.33).

After this report, UNESCO's higher education division continued its work and launched a process of regional Conferences, which turned out to be the beginning of the first World Conference on higher education.

In the foreword of the Final Report of the Conference, Federico Mayor, at that time UNESCO's Director-General, acknowledged that the problem of financing would be an imperative challenge, mainly for those countries enduring the burden of the debt. Indeed, he recognized that several developing countries, despite devoting large amounts of their GNP to pay the debt service -- hitherto in amounts equal or superior to the sum they received for new aid -- continued with growing debt. Taking this situation into consideration, he stated that in these countries "measures aimed solely at reinforcing management and using resources more rationally will not be sufficient" (UNESCO, 1998, p.5). He also indicated that other measures should be taken, such as the fulfillment, by the industrialized nations, of their share corresponding to 0.7% of their GNP for official development assistance, as approved by the United Nations' General Assembly.

In fact, the document criticized the preponderant use of economic ideas in our society and demanded broader changes, to be accomplished with the help of changed and reinvigorated higher education institutions:

> Higher education itself is confronted...with formidable challenges and must proceed to the most radical change and renewal it has ever been required, so that our society, which is currently undergoing a profound crisis of values, can transcend mere economic considerations and incorporate deeper dimensions of morality and spirituality. (UNESCO, 1998, p.20, italics added)

The importance of higher education for society as a whole was acknowledged in the preamble of The World Declaration on Higher Education as follows:

> Without adequate higher education and research institutions providing a critical mass of skilled and educated people, no country can ensure genuine endogenous and sustainable development and, in particular, developing and least developed countries cannot reduce the gap separating them from the industrial developed ones. (UNESCO, 1998, p.19)

Based on this rationale, The World Declaration on Higher Education recognized higher education as a public service and for this, it should be "preserved, reinforced and further expanded" (UNESCO, 1998, p.21). Although the document acknowledged the need for both public and private funding for the support of higher education, it defined the role of the state as essential concerning the provision of financial support (UNESCO, 1998, p.27).

The document also expressed concerns with the problem of brain-drain and proposed a strategy toward "brain-gain," implying the creation of an environment capable of attracting and retaining qualified personnel in developing countries; the development or enhancement of training programs in centers of excellence in developing countries with smalls period of study abroad, and the promotion of both South-South and North-South interchange and cooperation, based on "solidarity, recognition, mutual support and true partnership" (UNESCO, 1998, p. 28).

Indeed, it is worth mentioning that the World Bank also took part in this Conference, and the document prepared by a World Bank team for this World Conference carried very distinct positions from those accepted in the final document. Some of these World Bank's proposals include the adoption of tuition fees, the reduction of higher education personnel, the closure of courses and institutions, the increase in student enrollment, the shrinking of public support, and so forth. In fact, the World Bank document for the Conference clearly stated its position favoring radical change or restructuring of higher education, meaning:

> [E]ither fewer and/or different faculty, professional staff and support workers. This means lay-offs, forced early retirements, or major retraining and reassignment, as in: the closure of inefficient or ineffective institutions, the merger of quality institutions… and the radical alteration of the mission and production function of an institution – which means radically altering who the faculty are, how they behave, the way they are organized, and the way they work and are compensated. (Johnstone, Arora and Experton, 1998, p.22)

The authors of the mentioned World Bank paper for the World Conference acknowledged the existence of resistance to this radical change within public institutions, but they criticized such posture and its framework: academic freedom and education as a traditional right or continuity. Indeed, they stated that universities would not resist the pressures coming from a squeezed budget.

In summary, in their perspective, universities would accept some changes in order to survive. In their words:

> In the case of public universities, the faculty have additional means with which to resist threats of radical change and job loss: the idea of the university as a proper and necessary bastion of continuity and tradition; the tradition of academic freedom; and the army of students, former students, and would-be students, most of whom are articulate.... While public universities resist radical change, they are not immune to the loss of large amounts of public revenue. (Johnstone, Arora and Experton, p.22-23)

In a kind of Machiavellian discourse, they stated that the university resistance -- being able to cope or survive functioning with large classes, low-paid or part time professors -- "may be in fact its worst enemy" (Johnstone, Arora and Experton p.23).

8 - EDUCATION SECTOR STRATEGY (1999)- MORE COMMERCIAL APPROACH (ED. INVEST- PRIVATE SECTOR- EDUCATION "BUSINESS"

In 1999 The World Bank created a new service called Education Investment Information, or EdInvest. EdInvest renews the assumption of the government's lack of financial resources to expand or even offer education for all and at different levels; thus, this World Bank "service" advocates that this task would be better accomplished through the private sector, which is willing to assume this new educational business.

> [G]overnments' financial ability to further expand and improve education is limited. At the same time, private sector interest in investment in education is growing. Today, many developing countries welcome foreign investment in education, especially when it brings innovative technologies and approaches. Private sector investments in education are growing in all regions of the world and especially in low-income countries. (EdInvest, 1999)

Thus, more than ever, education is dealt with not as a human and social right; but as a commodity counting on multilateral institutions' financial and ideological support through the joint efforts of the International Finance Corporation (IFC) and EdInvest, as can be seen in the following quotations:

> Who Will Benefit from EDINVEST? Education companies exploring global investment opportunities; Schools and training institutions looking for investors; Corporations, including technology firms, trying to build more of a presence in developing countries; Non-governmental organizations; International banks; Other Investors.
> The IFC has sponsored a Global Study of investment opportunities in education. This initiative builds on the results of the Global Study. IFC investments in education are increasing, and World Bank Group clients are also looking for greater facilitation for private sector development in education. (EdInvest, 1999, italics added)

THE 1999 EDUCATION SECTOR STRATEGY AND THE KNOWLEDGE MANAGEMENT BANK

It is interesting to mention that the procedures for the making of the *1999* World Bank study were not broadly divulged. Even among educators used to dealing with and following the making of education policies, there was a kind of surprise in learning that a new policy paper had been approved.

Whereas the prior World Bank education policy paper carried a monetarist-cut-cost approach (World Bank, 1995a), the 1999 education policy paper supports an extremely commercial one. The new document is not so concerned with cost-benefit analyses and/or improving government managerial capacity. Although these issues are still important, the main aim seems to help open the education sector as a new business venture for private commercial education firms. The document continues to endorse the earlier emphasis on basic education, as well as advocates a market-based offer for ulterior levels, teacher training instead of formation, new technologies as the leading feature for curriculum reform, an so on.

"Effective teacher training" seems to be defined as distance education and using the Internet. Indeed, the Bank mentions three sites which support the idea of letting technology reduce educational costs and train teachers. This is what is called "innovative delivery" and the sites are <www.worldbank.org/depweb>, <www.globaldistancelearning.com> and <www.worldbank.org/worldlinks>.

The document lists the main areas of systemic reform that the Bank is going to support: 1) Standards, curriculum and achievement assessment; 2) Governance and decentralization; and 3) Providers and financiers outside the government. The report reads:

> [T]o encourage developing countries to establish standards for what students should know …, to develop good national assessment system, to develop training courses for policymakers and agency staff on what works and what doesn't and how to implement reforms.… [to foster this goal] the Bank will make available former education ministers and other high-level officials, detailed case studies of successful country experience, a website featuring global research on education reform.… [Concerning providers outside the government] the Bank will create an Internet information exchange highlighting investment opportunities in education in client countries (www.worldbank.org/edinvest). (World Bank, 1999b, ix-x, italics added)

These areas for reform will contribute to taking control and autonomy over academic work from students, parents, teachers, schools and community. As a consequence, the academic work will thwart the existence of references to and linkage with the local reality and peoples' lives.

The 1999 education sector document reinforces an openly commercial approach in which countries are called as "clients," and education is to be "delivered" as a package like any other consumer good. In fact, the World Bank's lending to and working in countries is referred to as "the Bank's education business" (World Bank, 1999b, p.37). Thus, education is neither treated as a human and social right nor as a profound and extensive process of observing, reading, writing, confronting, analyzing, proposing alternatives or questioning; but as a fast and disposable topic that can be delivered to your home by any educational enterprise of your "choice", with more affordable prices. In fact, there is great emphasis on new technologies.

Still reinforcing the assumptions of the governments' limited funds and bad management, the 1999 Education Sector Strategy (World Bank, 1999b) advocates the transference of public funds to private institutions, as well as the belief that families and communities should bear an increased part of the education costs. Although there is the perception that the previously advocated growth of enrollment at low costs and with low quality courses and fast trained teachers did not bring about good results, the role of the World Bank projects and "advice" were not pointed out, nor were the international trade, financial, environmental, political, economical- related issues. On the contrary, countries' internal problems, such as lack of innovation, managerial capacity and resources continued to be the focus of blame:

> Inequities persist and certain groups—especially females, minorities and the poor—are disproportionately excluded. Dropout rates are high in many regions, with only two thirds of children who start school staying to the fifth grade. Many children in school receive teaching of low quality, based on an outmoded and inappropriate curriculum. The result is poor achievement in test scores and unemployed graduates with the wrong skills (World Bank, 1999b, vii, italics added).

Another tendency that the document reinforces is a fragmented view of education, such as that of "development," in terms of stages or gradual steps. In fact, the document states that it is necessary to listen to the "client," but at the same time it establishes steps to be followed by countries or regions. The idea behind "these gradual steps" is that countries must begin with basic education and only go further when this level is fully accomplished.

However, I argue that the definition of priorities cannot be done *a priori* --the gradual steps-- by Bank personnel presenting as an argument a reduced and distorted view of the original Education for All initiative. Certainly, countries and workers have always fought for education for all at all levels, as a human and social right. Thus, the strategy is not offering education by steps, but to all levels. However, to provide all levels will take time and many more resources. Resources

exist, but more and more often they are concentrated in the hands of a few, who continue prescribing additional cuts and further austerity. They allow only minimal "concessions", such as basic education, to avoid population growth and social unrest. They also want to have people linked on the Internet, ready to take part in the e-trade, and buy goods produced outside their own countries. The national production capacity of each country shall not exist or be developed in full, but only at a minimal level or in areas that have a "comparative advantage." As a result, the poor will never be able to have advanced technology and develop science and technology related to their social, cultural, environmental, religious, ethnic and political environment.

If the poorest countries only have projects approved through the "steps" defined by the Bank, they will need to import -- or wait for the "delivery service" to bring -- a full, expensive and decontextualized educational package, including foreign Ministers of Education, for "technical" assistance to their doors. This means that the local capacity to create and propose curriculum, courses, evaluation (and not assessment or measurement) rooted in local reality will completely disappear, and more dependence will be created.

Isn't there a smart strategy to foster an "investment/business approach" for the education area, dealing with it as a new commodity in the commercial market? Isn't the "Knowledge Bank" an important representative of this new approach? Isn't the Bank ready to sell the "lessons of experience;" the "good" projects? As stated in the World Bank document:

> Another important strategic goal is to continue to build The Education Knowledge Management System [EKMS], helping strengthen the Bank's role as a **knowledge** institution, able to generate, synthesize, disseminate and share global knowledge to get local results and provide high quality advice to clients. (World Bank, 1999b, x)

In summary, there seems to be taking place a shift from a public sector accountability emphasis, based on cost-benefit analyses, to a retailer/marketing/seller framework, in which education is dealt with as a new commodity in the market of private services.

Moreover, with the fear of social unrest, the idea of the educational knowledge management bank appears to create the illusion of openness and of democratization of the knowledge. In fact, the EKMS is much more a filter, which ignores contexts and acts as a controller of the knowledge gathered and distributed. The EKMS only provides fragmentary knowledge; a kind of market for fast delivery "knowledge services". This is the kind of knowledge available. But the whole knowledge — complete reports or texts from authors and institutions with different perspectives -- is not offered in this "global knowledge Bank." In fact, as the EKMS name expresses, it is a

management system; and management implies control and selection, which is different than a broad, open, accessible and free public database, library or bookstore.

The 1999 education sector strategy must also be read with the on-line discussion about "attacking poverty." This discussion reveals the fear the rich groups have of the increasing danger of social unrest as the poverty gap widens. This on-line discussion also unveils the interest of these same groups in using, appropriating or controlling third world biodiversity, referred to now as our "shared resources," such as water. Moreover, they also want to transfer to the poor the responsibility of being able to survive with small amounts of resources and reduced government support and services. Thus, for the poor, the need is claimed to provide microcredits and safety nets, while for the rich, the free flow and huge remuneration for financial capital, tax exemptions, regressive taxation, free land, evasion in fiscal paradises and use of accountability tricks, continues.

Following similar reasoning, the 1999 education sector strategy does not advocate big structural changes to reduce the growing poverty or economic and social apartheid in the world. In fact, the document reinstates its faith that education is the only way to take the "poor out of poverty:"

> Education will determine who has the keys to the treasures the world can furnish. This is particularly important for the poor, who have to rely on their human capital as the main, if not the only, means of escaping poverty. (World Bank, 1999b, p.1)

Moreover, this Bank education policy paper seems to ignore the growth of homeless and street children; there is only education for "families," who may live in poor houses. And what about those without houses; the poorest of the poor, the already disenfranchised in society?

In relation to poor countries, the "new Knowledge Bank" indicates that it intends to make things more difficult, or more expensive:

> Some of the "minor" clients (such as South Africa) are in fact relatively large countries who at present only want non-lending services from the Bank. Here the question is whether to begin charging for technical assistance where it is not accompanied by lending—to avoid a situation where borrowing clients are subsidizing technical assistance to non-borrowing clients. (World Bank., 1999b, p.39)

Furthermore, in the 1999 education sector strategy, a historical perspective is lacking. Such a perspective cannot be confused with macro-economic analyses or statistical series presented out of a global/national context. What is missing is taking into consideration the countries' perspective and experience in dealing with their problems; What is missing is knowledge about indigenous research and studies; What is missing is real dialogue; What is missing is an interest and a humble posture to

learn and not to impose and sell "lessons of experience" coming from a distinct social and cultural milieu. What is missing is money, because most countries have the capacity and understanding of what they need, such as a financial support to go ahead and develop their own research and experiences, and not a "knowledge (the wiser) Bank" avid to sell services.

Likewise, not a word is mentioned about the previous accumulation process; that is, how rich countries became rich; not a word about how "development" has contributed to creating poverty, environmental depletion and helping the rich (national and international groups) to become richer by the construction of airports, hydroelectric power plants, dams, as well as selling products, consultants, etc.; not a word about the continuously unfair terms of trade, with quotas/tariffs on primary products when poor and developing countries were the main producers.

There is not a word about how debt was made and the exorbitant increase in interest rates, contributing to the debt explosion. Not a word about the adoption of the structural adjustment loans (SALs) and the huge transfer of money during the "lost decade," the 1980s, when the poor countries transferred to rich countries what was the equivalent to six Marshall Plans. There is also not a word about the World Bank's advice and declared need for countries to foster production for exports and to adopt cuts in budget affecting most social areas; this in the detriment of people's nutrition, health, education and well-being. At the same time measures helping to expand the benefits of the rich, such as regressive taxation, tax exemptions to multinationals, as well as tax evasion in fiscal paradises and offshore places, lending schemes to save multinational private banks were regarded as advantageous to foster development, improve countries' economies and reduce debt.

There is not a word about the transformation of debts with private multinational banks into debts with multilateral institutions; that is through the SAPS, multinational private banks got their money back, while debtor countries saw their debs continuing to grow despite having made large amounts of payments and, and as a result, became more dependent on multilateral banking development institutions, which hold the debt and use it as leverage to foster some specific projects and views. There is also not a word about the debt for equity swap schemes, helping the privatization of public national enterprises and services at a cheap price, generating denationalization and creating the perspective of fiscal imbalance in the future due to permanent occurrence of capital transfer.

There is also not a word about the effects of the pressure and sanctions for opening markets, leading to the destruction of many national/ local businesses, as well as widespread unemployment and increased dependence on the supply of basic food. Finally, there is not a word about the

consequences in following the unique solution presented as the way to reach development based on the idea of "comparative advantage," which is generating deeper exploitation of nature, causing the removal of people from their traditional lands, water and air pollution, as well as the destruction of native species. In summary, this comparative advantage is only creating more dependence, poverty and endangering life on our planet.

Thus, if all this national capacity, natural resources, and money sent abroad or lent were available, it would be ample enough to promote an authentic and integrated development: social, economic, cultural, technological and political. However, now countries are financially weaker and more dependent than ever.

Based on the 1999 education sector strategy and some other contemporary World Bank documents, it seems that the education area will reinforce this dependence trend. Indeed, it seems that the main target is to create intellectual dependence and impose a one-sided solution and view of the world by eliminating the possibility for the emergence of alternative perspectives.

In summary, the Knowledge Management Bank and its Education Knowledge Management System seem to be an attempt to foster the commodification, sterilization and standardization of knowledge. Therefore, it constitutes a serious peril to democracy, which presupposes diversity and not homogeneity.

9 - JOINT DOCUMENT ON HIGHER EDUCATION – 2000 (CONSEQUENCE OF WORLD CONFERENCE/ CHANGES AT UNESCO/ UNDP)

The document was produced by a group of experts organized under the name of "The Task Force on Higher Education and Society" (2000). The United States had some extra influence, not only by having more members, but also with members holding important positions. Besides having two members in the Task Force, occupying respectively the Co-Chair and Vice-Chair of the Steering Committee, there were also two American representatives working as Study Directors. From these four participants, two of them, David Bloom and Henry Rosovsky, both from Harvard University, were acknowledged as "the principal drafters of this report" (The Task Force on Higher Education and Society, 2000, p.6).

Another noticeable influence in the formation of the Task Force was Mr. Ismail Serageldin, a member of the World Bank staff. The joint document stated that both Mr. Serageldin and Mr. Kamal Ahamad -- an American attorney and one of the Co-Directors of Study -- "recognized earlier on the need for an independent examination of higher education… and whose efforts resulted the

establishment and initial funding of the Task Force (The Task Force, 2000, p.7, italics added). It is worthwhile to mention that Mr. Serageldin had the intention of succeeding Federico Mayor as UNESCO's general director, but later, a Japanese, Mr. Matsura, was designated for that office.

Indeed, Marco Antônio Dias, Director of the UNESCO Higher Education Division when the Task Force was created, revealed that:

> The Task Force [was] an action of a small group within the World Bank; it was not coordinated by the responsible sector on education within UNESCO, that is: the Education Department. The initiative departed from the bureau of Mr. Serageldin, candidate to be candidate to the position of UNESCO's Director-general. Within UNESCO [the initiative] did not have the participation of the Higher Education Division. (Dias, 2001, p.54)

Moreover, taking into account the efforts and mobilization being carried out for the organization of the World Conference on Higher Education, Marco Antonio Dias expressed his disagreement that a small parallel group of experts had been created to discuss an issue that was posed openly to a large group. Thus, he considered the Task Force initiative as

[I]nopportune in that moment.... The methodology was elitist and the way of conceiving the work authoritarian. All this goes against all efforts carried out by UNESCO.... which was working with [a large and differentiated group] and not with a small group of experts. If the World Bank would like to help, the best it could do was to support the organization of the World Conference on Higher Education, collaborate with financial resources in order to make possible the active participation of representatives of developing countries, and integrate within the discussion activities like all other groups. (Dias, 2001, p.54-55)

Facing the mentioned constitution and climate of dispute, it was not a surprise that this "joint" World Bank-UNESCO document was more similar to other World Bank publications, rather than those of UNESCO. Throughout the text, references were made to World Bank publications and supported projects, such as the "*1994 lessons of experience*" (World Bank, 1994) and experiences in South Africa and Singapore. Meanwhile, UNESCO documents, including its previous police paper on higher education (UNESCO, 1996) were not mentioned, nor was the final report of the World Conference on Higher Education (UNESCO, 1998). Even in terms of style, the "joint" document followed the World Bank's tendency of using the customary "enhanced boxes" with partial examples or summaries.

The Task Force document recognized the importance of education in society, stating that: "[B]illions of people still live in the darkness of poverty - UNNESCESSARILY ... this is in part because they cannot switch the 'light switcher' that is education" (The Task Force, 2000, p.19).

> The aforementioned assertion seems to overemphasize the power of education as the cause and solution of poverty and avoids a deeper discussion of the main cause of poverty, which would focus on the exploitation of poor individuals and groups by rich ones, resulting in increased accumulation — including knowledge — alongside widespread misery, anguish, hunger, etc.

In fact, the Task Force advocated a reduced perspective of knowledge in which knowledge should serve the profit-making interests of the economy and not the broader interests of the entire society: "The world economy is changing as knowledge supplants physical capital as the source of present (and future) wealth" (The Task Force, 2000, p.9, Indeed, this would characterize a "knowledge-based economy."

Thus, the conception of higher education used throughout the document was the same old banking conception of education as an investment; human capital, is again emphasized as the foundation of a "knowledge-based economy": "[W]ithout improved human capital, countries will inevitably fall behind and experience intellectual and economic marginalization and isolation" (The Task Force, 2000, p.18-19).

In this scenario, the role of higher education was enhanced, chiefly in the light of its contribution to economic development. Indeed, the role of university-based research was strongly supported:

> Educated people are well positioned to be economic and social entrepreneurs... They are also vital to creating an environment in which economic development is possible. Good governance, strong institutions, and a developed infrastructure are all needed if business is to thrive.... Finally,... the impact of university-based research on the economy – a far-reaching social benefit that is at the heart of any argument for developing stronger higher education systems. (The Task Force, 2000, p.39, italics added)

Following this rationale, the Task Force recognized the mistake in the use of rate of returns advocated during the 1980s by the World Bank and other agencies, as well as indicating the leverage exerted by the World Bank.

> The Task Force... believes that traditional economic arguments [based on rates of return] are based on a limited understanding of what higher education institutions contribute.
>
> The World Bank drew the conclusion that its lending strategy should emphasize primary education, relegating higher education to a relatively minor place.... The World Banks' stance has been influential, and many other donors have also emphasized primary. (The Task Force, p.39)

This change of discourse within a World Bank's characterized document did not mean an endorsement of the idea of higher education as a human and social right, with good quality and

relevance linked with the construction of a fair, equal and sharing society. Rather, in the context of a "knowledge-based economy" and an increasing unequal society, it seemed to aim at serving the need of corporations to use and control universities and research centers' capacity to produce new knowledge while also solving the problem of the growing demand for higher education, re-training and employment. This would be done while keeping the *status quo* regarding the unfair distribution of assets, accumulated wealth and knowledge.

The Task Force clearly proposed the adoption of a stratified system of higher education defined as follows: "A stratified system comprises one tier that is oriented toward research and selectivity and another that imparts knowledge to a large number of students" (The Task Force, 2000, p.50).

This stratified system was explained in a confused way. Earlier in the document, it was stated that the system should be composed of research universities, polytechnics, professional schools and community colleges (The Task Force, 2000, p.29). Later, that this system should be composed of research universities, provincial or regional universities, professional schools and vocational schools (The Task Force, 2000, p.48-50).

In this stratified system, research universities were situated at the top and were expected to develop basic research, as well as some applied research and produce a few highly-qualified specialists and broadly educated generalists: "Their instruction… should be aimed at the country's most hard-working and best-prepared students, [and most of these institutions] tend to be public and not for profit" (The Task Force, 2000, p.48).

Provincial or regional universities [polytechnics? community colleges?] should serve a larger number of students, emphasizing "teaching and the training of 'job-ready graduates'…. Some institutions [can] offer two-year tertiary level degrees, much like community colleges in developed countries (The Task Force, 2000, p.48-49, italics added). They could be both public and private.

Professional schools were to concentrate on technical training in some areas, such as law, medicine, business, and teaching. It was stated that these kind of institutions were not concerned with offering a broad view encompassing general education. Moreover, reinstating the rationale of training leading to the guarantee of private benefits, rather than social ones, it was stated that: "For-profit private institutions, in particular, can be directed into this area… concentrating on preparing students for careers with high private returns (The Task Force, 2000, p.49).

Vocational schools [community colleges?] were to carry out the role of instructing "practical skills for specific jobs in areas such as nursing, auto mechanics, bookkeeping, computers,

electronics, and machining" (The Task Force, 2000, p.49); that is, to perform similar tasks as professionals schools, yet at lower levels. Although it was acknowledged that "[T]hey are not often considered a component of the higher education system per se, and usually are part of the secondary or the post-secondary level" (The Task Force, 2000, p.49), the present document included it as the component located at the bottom of the system, and stated that it should be provided by private-for-profit institutions.

From all these institutions, only research universities were to be somewhat insulated from the short-term perspective of markets, counting on more time and resources to perform their main task in highly qualified teaching and research. However, as it will be pointed out later, these institutions were to be more receptive and responsive to market management principles and guidance.

Although the idea of placing external members to govern universities was criticized (The Task Force, 2000, p.60), the Task Force endorsed a more interventionist attitude being in "favor of strengthening appointing powers within university administrations [rather than elections], in order to allow strong leaders to emerge" (The Task Force, 2000, p.65, italics added). Those leaders were seen as "better able to make unpopular decisions when required." In addition, it was stated that: "[S]hared governance does not guarantee quality if a tyrannical majority is determined to prevent progress" (The Task Force, 2000, p.68, italics added).

The document recognized that research universities were underfunded and that: "[D]eveloping countries spend far less than developed countries on each student" (The Task Force, 2000, p.25). Notwithstanding, it took for granted the existence of budgetary constraints: "Developing countries are left with a formidable task – expanding their higher education system and improving quality, all within continuing budgetary constraints" (The Task Force, 2000, p.36).

The document suggested the use of their precarious financial situation to make indebted countries agree to adopt reforms on higher education. A new debt-swap scheme was proposed, now focused on higher education institutions: "[D]ebt relief can be negotiated in exchange for systemic higher education reform" (The Task Force, 2000, p.57-58). Indeed, this was a clear suggestion to multilateral-banking institutions to make use of the leverage they had acquired with the management of developing countries' external debt.

The Task Force once more reinforced the idea of poor management as the main problem within higher education: "We believe that poor management is often the single greatest obstacle to stronger higher education" (The Task Force, 2000, p.95).

Thus, the adoption of a market-driven management perspective with performance indicators was endorsed. As an example, the teachers' payment structure was mentioned. It was viewed as an "ill-conceived incentive structure," in which "pay increases are governed by bureaucratic personnel systems... [and] market forces to reward good performance, are seldom used" (The Task Force, 2000, p.23-24).

Autonomy was chiefly endorsed as a way to obtain funds:

> An often-neglected policy is to allow institutions the autonomy to develop new ways to get revenue. Offering executive training programs, marketing the expertise of faculties, and providing various other services such as carrying out laboratory tests and renting facilities, can all provide valuable income. (The Task Force, 2000, p.58)

Moreover, further private contributions, mainly from students and their families, and additional efforts toward the use of technologies in the provision of distance learning were also advocated as ways to improve the offer, quality and financing of higher education.

Concerning international "cooperation" and distance learning, the problem of franchising within higher education was recognized; that is, universities from rich nations offering low quality courses in developing and poor countries: "The sponsoring institution, mainly in the United States or Europe, often has a "prestige name" and is motivated by pecuniary gain, not by spreading academic excellence" (The Task Force, 2000, p.43).

Notwithstanding this recognition, distance learning was advertised in the document not only as a way to serve a broader and not yet reached number of students, but also as a way to educate national leaders with international recognition, as it was exemplified by mentioning Nelson Mandela and Robert Mugabe (The Task Force, 2000, p.31). In fact, once more, it seems that the Bank uses some exception to the rule to convince that distance learning is a good policy and will give opportunity to anyone to be new leaders. Did these two leaders, Mandela and Mugabe, become leaders because of distance education or because they learned in the outside world through their struggles in life, reflecting over their living conditions?

The document proposed a subordinate role for developing countries, which were to be guided by the international experts: "[T]he international community... must provide support and leadership [in terms of] planning and higher standard of management' (The Task Force, 2000, p.10, italics added).

The document also advocated the establishment of a stratified organization in terms of knowledge creation, access and dissemination, equally for countries and individuals. Rich and

upper-middle income countries and individuals were expected to produce knowledge and have access to high quality knowledge while poor or low-income individuals and countries, were expected to assimilate the production: " Low-and lower-middle income-countries...[must] focus... on developing the capacity to access and assimilate new knowledge" (The Task Force, 2000, p.35, italics added).

In summary, this "joint" World Bank-UNESCO document denies the fundamental issues contained within UNESCO's previous documents. In a broad political context, it characterizes the dispute between UNESCO and the World Bank. Indeed, it can be seen as a kind of reaction performed by the World Bank facing the previously mobilization UNESCO had achieved, which generated and culminated with the 1998 World Conference on Higher Education. It also must be seem as the result of pressures for change at UN institutions.

Making a comparative synopsis of these UNESCO documents with those from the World Bank, it is possible to perceive that they expressed distinct perspectives on higher education. In fact, there are many divergent aspects, starting with the importance of higher education for society as a whole, and not only from a myopic viewpoint that only sees benefits for the economic area or for private individuals. Thus, its long-term effects and contribution to society should not be reduced to dubious calculations done by the stringent advocates of cost-benefit analyses.

Considering the importance, work and potential of higher education improving life in society, UNESCO reinforced the idea that financial support should be assured as a vital matter both from the State and society in general, but reinforcing the role of the State. However, the contribution should be based on a long-term perspective and not a strictly short-term market driven one, and fees were not directly advocated. Indeed, higher education should contribute to the construction of a more humane, equal, just and sharing society, aiming particularly at eliminating poverty, illiteracy, violence, hunger, environment depletion and diseases.

Academic freedom and autonomy were to be reaffirmed based on academic principles, human rights, ethics and solidarity, and not on the freedom to sell services, charge fees, be responsive to productivity indicators, or substitute cooperation and solidarity for competition. Indeed, those market-driven approaches were deemed as insufficient for solving the decaying situation of higher education institutions in many countries, mainly those facing the burden of the debt.

Notwithstanding, both multilateral institutions used similar names and defended some similar proposals, such as open enrollment, differentiation of institutions, flexible organization, new curricula, new methods of teaching, use of new technologies, definition of comparative standards for evaluation, and need of public and private funding. However, they carry a distinct framework: The World Bank, a multilateral banking institution, continues to defend a market-driven approach while UNESCO, a UN institution, a human rights approach.

Based on the previous analyses, it is possible to perceive that World Bank policy proposals (or guidelines) are far from contributing to reduce the knowledge gap between individuals or countries; rather, these policies seem to foster more submission and dependence. In addition, UNESCO, who used to carry a perspective more linked with people auto-determination and sovereignty, seems to have suffered a great influence from the World Bank/rich groups, leading it to endorse a joint document so distinct and different from UNESCO/UN earlier principles.

10- CONTRADICTIONS AND REACTIONS- WORLD SOCIAL FORUM/ WORLD EDUCATION FORUM/ "THE LATIN-AMERICAN PRONOUNCEMENT ON EDUCATION FOR ALL" AND "THE FIRST IBERIAN-AMERICAN MEETING OF STATE UNIVERSITY RECTORS"

The discourse of modernity linked with market paradigms and consumption, (fast communications through computers, flexibility, efficiency, cost and benefits, productivity, etc.) that continuously promises a better life in the future for the majority, is colliding with reality, and is being unmasked. Indeed, this promise is completely unreachable in this model based on unequal division of assets, resources and social products that still tries to force governments to exclusively protect the interests of those proprietors and to use all resources and institutions to assure the exploitation of the dispossessed.

Reality is revealing the result of the adoption of this kind of perspective and is showing how this (neo)liberal/business/market/legal perspective is failing. Many news reports a rise in poverty worldwide, even in rich countries. There is also the return of diseases which had been kept under some control for years, such as cholera, tuberculosis, malaria, and dengue as well as the emergence of new ones, such as AIDS, killing so many people that it is already significantly affecting the estimated population growth in some African countries.

The end of stable and well-paying jobs for a large group in society (middle class, ex-factory workers) in many places of the world, and its substitution by menial or part-time jobs with low

salaries or even by unemployment, has resulted in the increasing impoverishment of larger sectors of society that were formerly secure economically. At the same time, the media continues its seduction game, offering products and credit, generating great indebtedness and personal bankruptcy. The reduction in income and the increase in debt create the necessity to get several jobs, to survive or to maintain living standards. Furthermore, this situation is generating despair, family abandonment, psychological problems, psychiatric disorders, disharmony, violence, and suicides (Forrester, 1997). Scenes similar to that one of 1930's in which people were digging in garbage to find something to eat are present in several places of the world, with increasing hordes of landless, homeless, jobless and starving wandering in a world of abundance.

However, there are reactions, such as the creation of the World Social Forum, the movement known as The Latin-American Pronouncement on Education for All (Pronuciamiento de Educadores Latino-Americanos) and the First Iberian-American Meeting of State University Rectors (Primera Cumbre Iberoamericana de Rectores de Universidades Estatales" or "Cumbre de Santiago).

THE LATIN-AMERICAN PRONOUNCEMENT ON EDUCATION FOR ALL

The Latin-American Pronouncement on Education for All (Universidad de Santiago de Chile, 1999) aims to rescue the ample and original idea of basic Education for All (children, youths, and adults), inside and out of the school system and in a continuous way, in which secondary education, youths and adult training, as well as and higher education cannot be delayed. It states as primordial the idea that "the educational development should be inspired by fundamental human values" and that "the educational quality implies in recognizing the need of diversifying educational offer in order to assure not only the respect, but also the invigoration of the distinct cultures." Moreover, it indicates that the following values should be rescued and reaffirmed: the respect for the human person; solidarity; the collective well-being; opening for the plurality of the races, ethnicities and cultures; recovery of the symbolic, traditions and of the perception of the beauty; freedom, understood as construction of the individuals' autonomy and groups facing the oppression; conception of the work as personal accomplishment and fundamental right and not as an issue subordinated to the profit seeking objective, and so forth.

Concluding the document of the Latin-American Pronouncement on Education for manifests its concern "with 'unique thought ' installed in education within the last years, the strong economic

bias and the weight of management as central components of the educational reforms". Finally the document demands that national governments and society recoup their leadership and initiative within the education field: "After a period of strong homogeneity in educational politics and of simplification of the educational processes, it is indispensable to recover the capacity to think and to act starting from the accumulated knowledge and of the specificities of each national and local context."

FIRST IBERIAN-AMERICAN MEETING OF STATE UNIVERSITY RECTORS

In August 1999, rectors of public universities from Iberian-America came together and held a first meeting known as "Primera Cumbre Iberoamericana de Rectores de Universidades Estatales" or "Cumbre de Santiago." This meeting was carried out in Santiago, Chile, the country that initiated reforms and had more than a decade of adverse effects on its higher education system in terms of quality of education, opportunity of access and permanence of students from low-income families, development of research activities, university insulation and autonomy from market forces, and so forth.

At the end of the "Cumbre," the Santiago Agreement or "Acuerdo de Santiago" was approved. Some of the principles approved were that: a) public universities, as public entities, are owned by all citizens and must serve the well-being of all citizens; b) public universities must be committed to Constitutional values, not to transient policies, such as those of educating for the benefit of the market, which tends to privatize all activities; c) they must be financed by the State; d) they must espouse the conception of knowledge as a social good and not a private good; e) the knowledge generated and disseminated by public universities cannot be utilized or managed as a single commodity; f) free-tuition is a way of allowing those students from low-income families to have access to a quality higher education; g) public universities have an essential commitment with public ethics and are devoted to the preservation of culture and support for peace (Universidad de Santiago de Chile, 1999, p.1-2).

Moreover, it was emphasized that:

> The ethical commitment of public universities is each day more urgent, due to the growing deterioration of living conditions of many in society, increasing inequalities and poverty…[due to] the escalation of unemployment and functional poverty, and the lack of access to basic services, such as education and health, and other basic needs are generating conditions that can lead to the rupture of social-cohesion, insecurity and violence. [Public

universities must be] aware of the growing environment depletion caused by the actions of human beings, mostly affecting marginalized people with the strength of natural phenomena, associated with this deterioration. [They must contribute] to the protection of our [Iberian-American] cultural identity in order to enable us to integrate in this globalized world with our own personality and from our interests and perspectives. (Universidad de Santiago de Chile, 1999, p.2-3)

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